

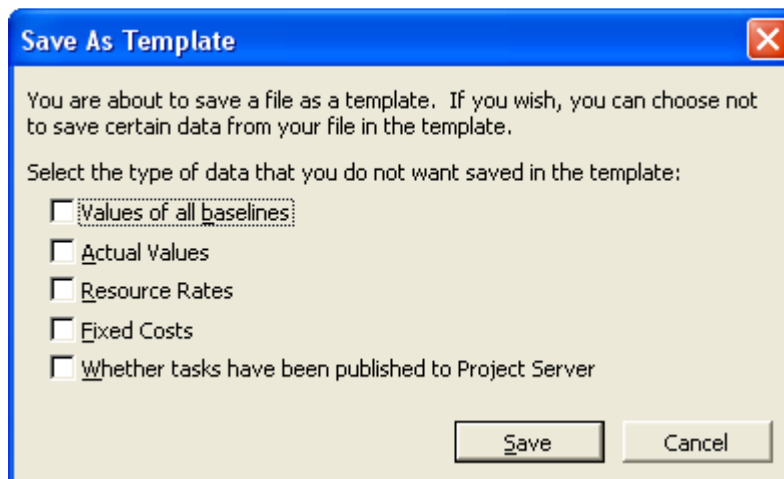
Article for MPA ezine – June 26, 2008
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Subject: Tips for creating templates

Rob S. of Schaumburg, IL asked: Can you give me some best practices for creating MS Project templates? And in a related question **Rebecca S. from Lansdale, PA asked:** I just completed a project and I want to re-use the schedule to manage another similar project. I have cleared out some of the task fields but there seems to be a lot of left over data. How do I turn an existing project schedule into a template?

Answer: I'd like to start with Rebecca's question regarding taking an existing project schedule and using it as a template. Just clearing specific fields of information will not remove all related calculated fields that have been affected. The best way to turn a "used" schedule into a template is to save it as a template and programmatically remove data. See below for the steps which apply to versions MSP 2000 through MSP 2007 only:

1. File → save as
2. At the bottom of the form select in Save as type : Template
3. The form below will appear:



Select all of the values that you would like removed and click Save. The template will also be placed in the template area on your hard drive and ready for use when needed. To use the template click on:

1. File → New → on my computer (left bar).
2. The template should be in the General section of the form.
3. Click on it, then click on OK

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Below are also a few tips to make your template easier to use.

1. A template should not contain any dates, baselines, constraints or deadlines.
2. Use common language – stay away from the company speak and use real words. The next person who uses it might not be familiar with the internal language of the organization. Also, this will be extremely helpful if you expect contractors to use your templates or if you use the project schedule to create customer facing reports and presentations.
3. Use generic resources (or roles). Use the real job title and not an abbreviation. If it is an internal term, explain it in the notes.
4. All tasks should have a predecessor and a successor except the first and last tasks. Add milestones in meaning locations throughout the schedule. Check usefulness by applying the Milestone filter and checking the milestone report. Milestones are goal points and should be treated as such.
5. Use notes to explain what the work of the tasks is. Use notes to explain details concerning a resource requirement. Use notes to explain details concerning an assignment. You might know what you mean but do others?
6. Add schedule slack into the template by adding tasks in the project or at the end of the schedule to reflect slack. Never create a template for the tightest schedule possible.
7. Divide the work into logical sections of work. If the template is at a high level, include check lists in the notes fields. Don't put in so many details it becomes overwhelming.
8. Duration and Work estimates should be for worst case, not best case.
9. Resource Level the template. Generic resources can be leveled and should be to reflect a more realistic picture.
10. Use this time to create standardized reports and custom elements that can aide you in creating a repeatable process.

These are just a few tips to get you started and by no means reflect a complete list of possible do's and don'ts. Send me some of your ideas (ellen@lehnertcs.com) and I'll write a follow up article of suggestions from the readers on template construction. Tell me what you have found most useful and what didn't work for your organization.